





## Overview:

Within the CalHEERS Agency Portal, Agency Managers have the ability to edit some of the information for Agents within their Agency.

## Edit Information

To edit Agent information within your Agency Roster, the Agency Manager can select the edit link from the “Actions” column for a specific Agent they want to update.

Agency Account ▾ My Delegations ▾ My Agent Profile ▾					
Agent Name ▴	Active/Inactive	Consumers	Agent License # ▴	Certification Status	Actions
Able Agent	InActive	0	1234567	Pending	
Coveredca University	Active	1	1221223	Certified	

 Edit  
 Transfer Consumer Delegations


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## Agent Information Page

For an Agency Manager to update their own Agent Information, they can select the edit option associated with their name, or via the “My Agent Profile” drop-down menu.

From the “My Agent Profile” drop down menu, Agency Managers can view their own:

- **Agent Information**
- **Profile**
- **Certification Status**
- **Status**



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Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

My Agent Profile ▾

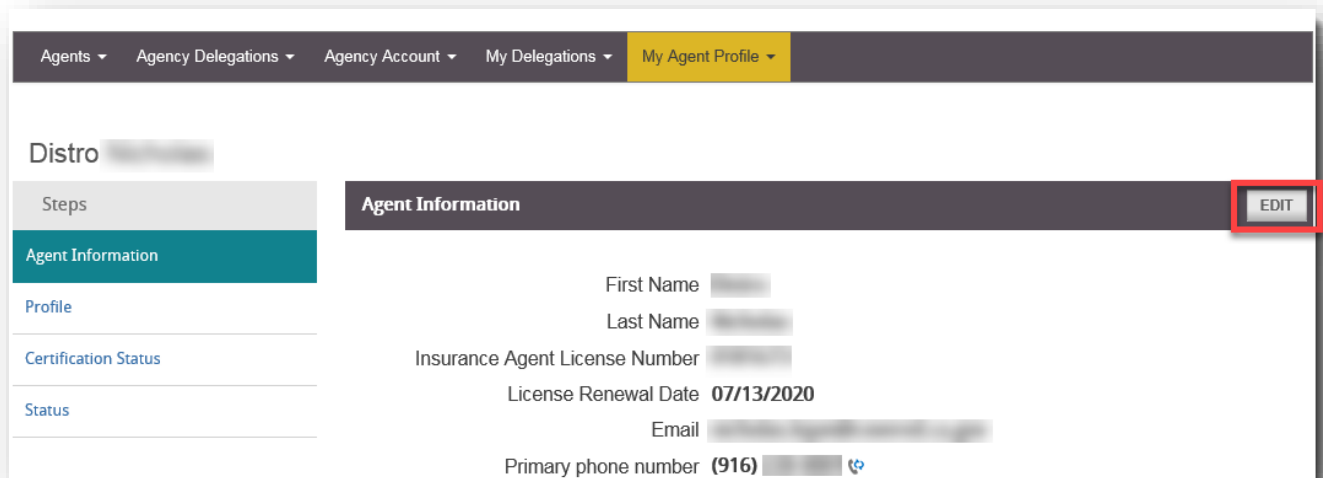
- Agent Information
- Profile
- Certification Status
- Status

Click the “Agent Information” link to navigate to the “Agent Information” page,

Click the edit button to edit the unshaded fields in on the “Agent Information” page.

- You must contact Agent Contracts at [agentcontracts@covered.ca.gov](mailto:agentcontracts@covered.ca.gov) to make changes to shaded fields.

**Please Note:** Only **Agency Managers** have the ability to edit portions of their information within this tab.



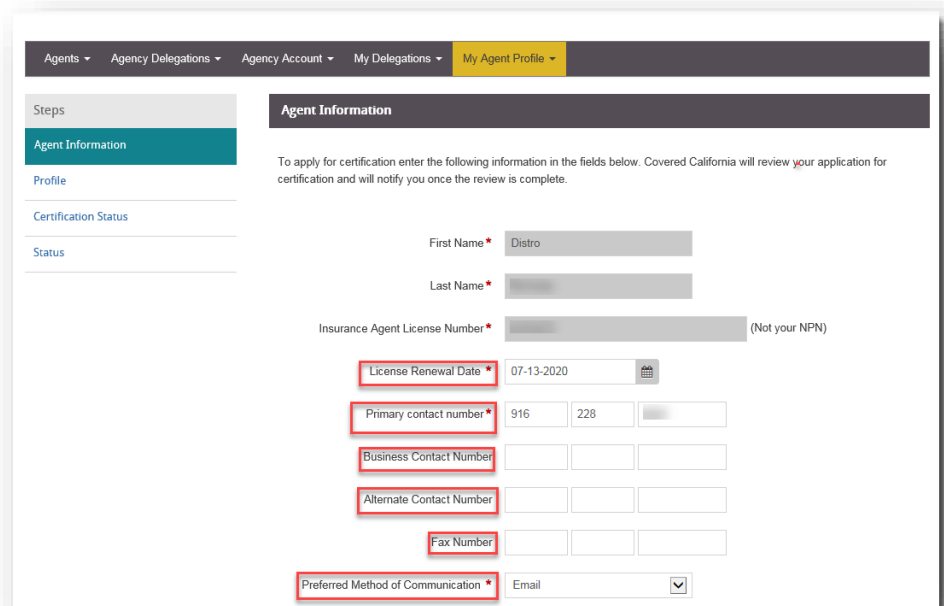
The screenshot shows the 'My Agent Profile' page with the following elements:

- Navigation bar: Agents, Agency Delegations, Agency Account, My Delegations, **My Agent Profile**.
- Left sidebar: Steps, **Agent Information**, Profile, Certification Status, Status.
- Agent Information section:
  - First Name: [shaded field]
  - Last Name: [shaded field]
  - Insurance Agent License Number: [shaded field]
  - License Renewal Date: 07/13/2020
  - Email: [shaded field]
  - Primary phone number: (916) [shaded field]
- EDIT** button (highlighted with a red box).

Agents within the agency must contact the Agency Manager to edit this information.

On the “Agent Information” page Agency Managers can edit:

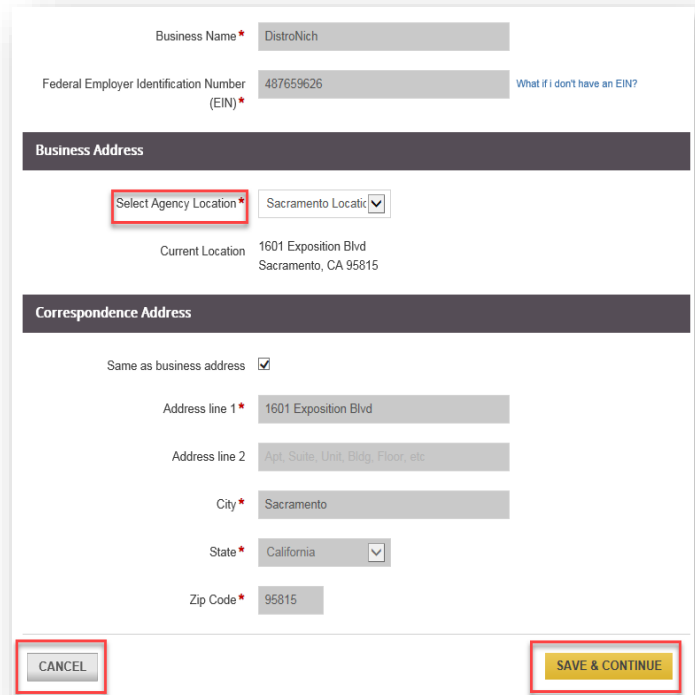
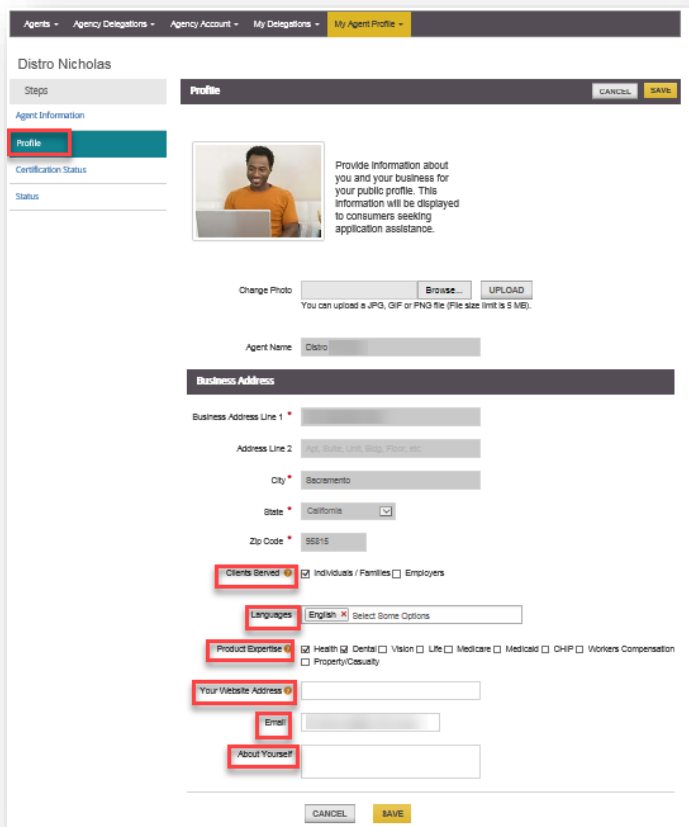
- License Renewal Date
- Contact Numbers
- Preferred Method of Communication
- Business Address/Location



The screenshot shows the 'Agent Information' page with the following elements:

- Navigation bar: Agents, Agency Delegations, Agency Account, My Delegations, **My Agent Profile**.
- Left sidebar: Steps, **Agent Information**, Profile, Certification Status, Status.
- Agent Information section:
  - To apply for certification enter the following information in the fields below. Covered California will review your application for certification and will notify you once the review is complete.
  - First Name: Distro
  - Last Name: [shaded field]
  - Insurance Agent License Number: [shaded field] (Not your NPN)
  - License Renewal Date: 07-13-2020
  - Primary contact number: 916 228 [shaded field]
  - Business Contact Number: [shaded field]
  - Alternate Contact Number: [shaded field]
  - Fax Number: [shaded field]
  - Preferred Method of Communication: Email

When you have completed your edits, select “Save and Continue” to save your changes.

## Agent Profile Page

To update the information that displays on **Find Local Help**, select the “Profile” link from the menu on the left of the page. When the “Profile” page loads, select the “Edit” button to update the information.

Agency Managers can edit the following information in their Agent Profile:

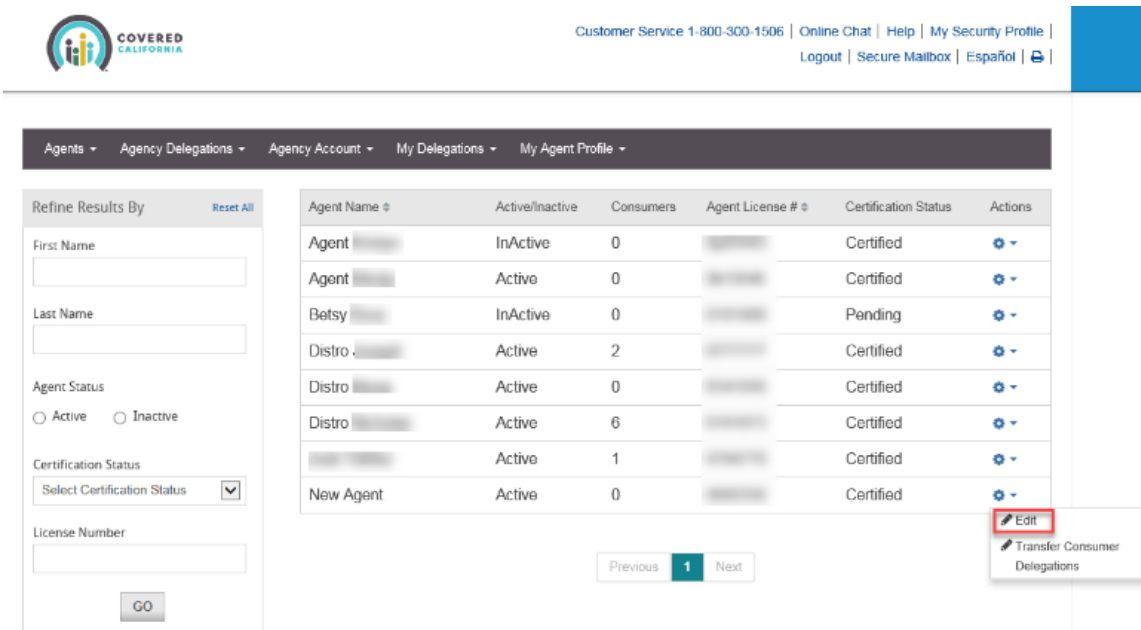
- Client’s Served Population
- Languages
- Website
- Email Address (must be unique)
- About Yourself Information


**Please Note:** Only **Agency Managers** have the ability to edit portions of their Profile page. Agents within the agency must contact the Agency Manager to edit this information.

## Agent Status Page

The Agency Manager can edit the status of an Agent within the Agency, enabling or disabling the ability for the Agent to do business under the Agency. The Agency Manager can also edit their own status.

- **Active:** Able to access all available user portal screens, edit Agent, Agency and Individual Agent information, perform all Agency Manager functions
- **Inactive:** Able to login to the CalHEERS portal, with view only access, except for changing the Agency Manager's own Status from Inactive to Active.



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Agents ▾ Agency Delegations ▾ Agency Account ▾ My Delegations ▾ My Agent Profile ▾

Refine Results By [Reset All](#)









First Name

Last Name



Agent Status  
☐ Active ☐ Inactive

Certification Status  
Select Certification Status ☐

License Number

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Agent	InActive	0		Certified	
Agent	Active	0		Certified	
Betsy	InActive	0		Pending	
Distro	Active	2		Certified	
Distro	Active	0		Certified	
Distro	Active	6		Certified	
	Active	1		Certified	
New Agent	Active	0		Certified	

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Agency Managers can select the “Edit” button from the Status page and update the status of any agent within the Agency from “Active” to “Inactive” or “Inactive” to “Active.”

**Status**

Status **Active**

Status \*

Comment